Arizona State Retirement System (ASRS) Oracle Modernization Project
Information Technology Authorization Committee (ITAC) Status Report For Year 2, September 2015

The ASRS Oracle Modernization Project is a five year, $10.2 million project with a goal to modernize a legacy Oracle Forms and Reports Public Employee Retirement Information System (PERIS) by reengineering it into an existing Java based PERIS Online system (POL). The project was started on September 16, 2013. Since September 2013, five of the twelve applications have been completed and two other PERIS applications are in the process of being modernized. In FY2015, the Oracle Modernization Project utilized three Scrum teams, instead of the original two Scrum teams. Starting in FY2016, we will be back to utilizing two Scrum teams. This is due to one of the Scrum teams transitioning to another multiple year project, Benefits Disbursements, which will be moving disbursement related activities away from our current custodial bank. The ASRS Oracle Modernization project is on track to complete on time at the end of December 2018 (original finish date). Details for the the twelve Oracle Modernization applications are provided below.

Application	PM	Description	Start Date		Finish Date		Hours (as of 8/31/15)				User Stories	% Complete	Status	Comments
			Estimated	Actual	Estimated	Actual	Original	Appr'd Change	Revised	Actual				
Infrastructure & Member Summary	MA	Infrastructure & Member Summary was completed on 4/30/14, ahead of the 9/29/14 estimated finish date and under the 10,175 hour estimated budget. Member information has been consolidated in a single place. An enhanced member search facility has been provided. Navigation to other PERIS Online (POL) applications has also been improved.	9/16/2013	9/16/2013	9/29/2014	4/30/2014	10,175		10,175	4,441	52	100%	●○○	Implemented 2/26/14
Participant Demographic	SW	Participant Demographics was completed on 12/4/2014, ahead of the estimated finish date and under the original budget of 15,414 hours. 3,914 hours from the Participant demographics budget was transferred to Membership Accounting. Participant demographic and contact information is consolidated in one place. Business users are able to view and authorized business users are able to maintain both non-retired and retired beneficiaries.	4/1/2014	10/28/2013	6/9/2015	12/4/2014	15,414	(3,914)	11,500	10,742	65	100%	●○○	Implemented 12/4/14

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Application	PM	Description	Start Date Estimated	Start Date Actual	Finish Date Estimated	Finish Date Actual	Hours (as of 8/31/15) Original	Hours (as of 8/31/15) Appr'd Change	Hours (as of 8/31/15) Revised	Hours (as of 8/31/15) Actual	User Stories	% Complete	Status	Comments
Membership Accounting	MA	Membership Accounting was completed on 5/27/2015, ahead of the estimated 6/10/2016 finish date and under the revised budget of 14,941 hours. Requests for member salary, service and/or account balance maintenance replaced a manual and paper driven process with automated calculations, workflow and document imaging. Merge SSNs requests have been completely automated eliminating data change requests to the Technology Service Division (TSD). A facility to maintain forfeiture, new retiree, survivor benefit and legal hold account events was also modernized.	6/2/2015	1/7/2014	6/10/2016	5/27/2015	11,027	3,914	14,941	13,198	87	100%	●○○	Implemented 5/27/2015
Employer Demographic	JJ, SW	Employer Demographics was completed on 4/30/15, ahead of the 6/8/2015 estimated finish date. The application was completed a little over budget, budgeted hours were 5,485, actual hours were 5,903 hours. All employer demographic information is consolidated into a single place eliminating the need for multiple Excel spreadsheets to maintain employer contact information. A facility to document and view employer contact information has been provided.	10/1/2014	7/11/2014	6/8/2015	4/30/2015	5,485		5,485	5,903	44	100%	●○○	Implemented 4/30/2015
Service Audit	TD	Service Audit was completed on 5/27/15, ahead of the 1/26/2017 estimated finish date. The application was completed a little over the revised budget (4,126 hours were added to the service audit budget from the reserve budget). Revised budgeted hours were 8,361, actual hours were 8,522 hours. The service audit application in PERIS was modernized to eliminate unnecessary steps and resolve existing application problems and constraints. In addition the service adjustments functionality was integrated into service audits eliminating a separate workflow and department. Service audit was made more visable to business users outside of the service audit team by adding service audit information to the member summary.	7/5/2016	5/7/2014	1/26/2017	5/27/2015	4,235	4,126	8,361	8,522	73	100%	●○○	Implemented 5/27/2015
Service Purchase	MA	Service Purchase started on 12/23/14 ahead of the original start date of 8/3/2016. As of August 31, 2015 four sprints of development have been completed. Service Purchase is a large and complex application which includes processing the service purchase request, calculating the cost and service to be purchased, generating an invoice, receiving and processing payment information from the member and/or employer. Service purchase payroll deduction agreements may also be set up with both member and employer.	8/3/2016	12/23/2014	8/22/2017		11,014		11,014	3,372		31%	●○○	In progress

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Application	PM	Description	Start Date		Finish Date		Hours (as of 8/31/15)				User Stories	% Complete	Status	Comments
			Estimated	Actual	Estimated	Actual	Original	Appr'd Change	Revised	Actual				
Health Insurance	MA	Health Insurance started on 2/9/2015 ahead of the original start date of 8/1/2017. The original plan had Health Insurance scheduled as the last application to be modernized. It was moved up in schedule at the request of Senior Management to align Health Insurance development with the Benefits Disbursements Project. As of August 31, 2015 two sprints of development have been completed. Health Insurance is a large and complicated application which includes establishing health insurance carriers and plans, employer plans and rates, member health insurance enrollment, member health insurance coverage changes and integrating member health insurance deductions and supplements with the new retiree and pension payrolls.	8/1/2017	2/9/2015	12/19/2018		14,836		14,836	2,774		19%	●○○	In progress
Benefits Accounting			2/1/2017		9/24/2018		17,652							
New Retiree Processing			9/1/2017		2/14/2018		3,684							
Contribution Accounting			6/2/2015		7/22/2016		16,209							
Accounts Receivable Ledger			6/1/2016		11/4/2016		3,581							
Fiscal Year End			5/1/2017		9/28/2017		1,854							
Total Hours Spent (as of 8/31/2015)							115,165			48,950		43%		
Total Dollars Spent (as of 8/31/2015)							$10,214,406			$3,452,245		34%		